

**Phoenix Program  
Process Definition – Asset Management**

Process	<b><i>Reviewing Vouchers and Purchase Orders</i></b>
Process Number	<b><i>AM-015</i></b>

***Description of Process***

This process allows users to view Purchase Order and Payables information related to assets.

***Input to Process***

Assets processed through Purchasing / Accounts Payable.

***Output of Process***

Panel display of Purchasing / Accounts Payable information.

***Service Level Agreement Required? (if yes, provide a brief description)***

--

***PeopleSoft Panel Groups being Used***

Function	Panel Group
Manage Assets	Manage Assets

## Phoenix Program Process Definition – Asset Management

### ***Business Process Description***

<b>Process Description</b>		<b>Responsibility (Agency/Centralized)</b>
<b>Step 1</b>	<b>Reviewing voucher information.</b>	Agency
1.1	From the Manage Assets, Manage Assets panel, select Use, Asset Basic Information, Acquisition Detail 2, Update/Display. At the prompt, enter a Business Unit and other search criteria if known. Click OK. The asset or list of assets will appear. Select an asset from the list.	
1.2	Click the Payables Info... button. The Payables Detail window will display some available information. For additional information, click the PS Accounts Payable Drilldown button "?". A search dialog box with related voucher information will appear. Correct the SetID and Business Unit if necessary and click OK.	
1.3	The Manage Assets – Inquire – Vouchers panel will appear. Review the information.	
1.4	For additional information, from the Go, Administer Procurement, Enter Voucher Information panel, select Use, Voucher, Invoice Header Information, Update/Display. A search dialog box will appear. Provide the Business Unit and Voucher and click OK. Review voucher information.	
<b>Step 2</b>	<b>Reviewing purchase order information.</b>	Agency
2.1	From the Manage Assets, Manage Assets panel, select Use, Asset Basic Information, Acquisition Detail 2, Update/Display. At the prompt, enter a Business Unit and other search criteria if known. Click OK. The asset or list of assets will appear. Select an asset from the list.	
2.2	Click the PO/Recv Info... button. The Purchasing/Receiving Detail window will appear. For additional information, click the PS Purchasing Drilldown button "?". A search dialog box with related purchase order information will appear. Correct the SetID and Business Unit if necessary and click OK.	
2.3	The Manage Assets – Inquire – Purchase Orders panel will appear. Review the information.	
2.4	For additional information, from the Go, Administer Procurement, Manage Purchase Orders panel, select Use, Purchase Order, Lines, Update/Display. A search dialog box will appear. Provide Business Unit and Purchase Order. Click OK. Review the Purchase Order.	
<b>Step 3</b>	<b>Reviewing receiving information.</b>	Agency

## Phoenix Program Process Definition – Asset Management

3.1	From the Manage Assets, Manage Assets panel, select Use, Asset Basic Information, Acquisition Detail 2, Update/Display. At the prompt, enter a Business Unit and other search criteria if known. Click OK. The asset or list of assets will appear. Select an asset from the list.	
3.2	Click the PO/Recv Info... button. The Purchasing/Receiving Detail window will appear. For additional information, click the PS/PO Receiving Drilldown button "?".	
3.3	The Manage Assets – Inquire – Receivers panel will appear. Review the information.	
3.4	For additional information, from the Go, Administer Procurement, Receive Shipments panel, select Use, Receive with Purchase Order, Receipt Items. A search dialog box will appear. Provide Business Unit, PO Business Unit and Purchase Order. Click OK. A list box will appear. Select an item. Review receipt information.	

### ***Forms Used with Process (#)***

None

### ***Process Flow Diagram (if appropriate):***

None

### **Process Signoff**

Tested By  
Date Tested